

Prior ART

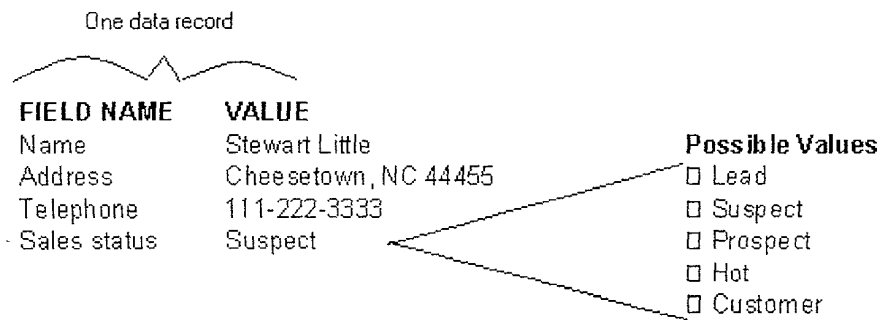


FIGURE 1

PRIOR ART

Name	Source of lead	Enjoys Sports	Enjoys Ballet	Smokes Cigars	Sales Cycle Status
Alice	Web	Yes	Yes	Yes	Suspect
Bobby	Call in	No	No	No	Lead
Joe	Direct Mail	Yes	No	No	Suspect
John	Web	No	Yes	Yes	Prospect
Mark	Direct Mail	No	No	Yes	Lead
Mary	Call in	Yes	No	Yes	Lead
Michael	Call in	No	Yes	No	Lead
Paul	Web	Yes	No	No	Lead
Peter	Web	No	Yes	Yes	Prospect
Raymond	Direct Mail	Yes	Yes	No	Hot Prospect
Rodney	Web	Yes	No	Yes	Lead
Samantha	Call in	Yes	No	No	Prospect
Sylvia	Call in	Yes	No	No	Suspect
Tracy	Web	No	Yes	No	Hot Prospect
Trent	Web	No	No	No	Suspect

FIGURE 2



# Arrayworks Engine

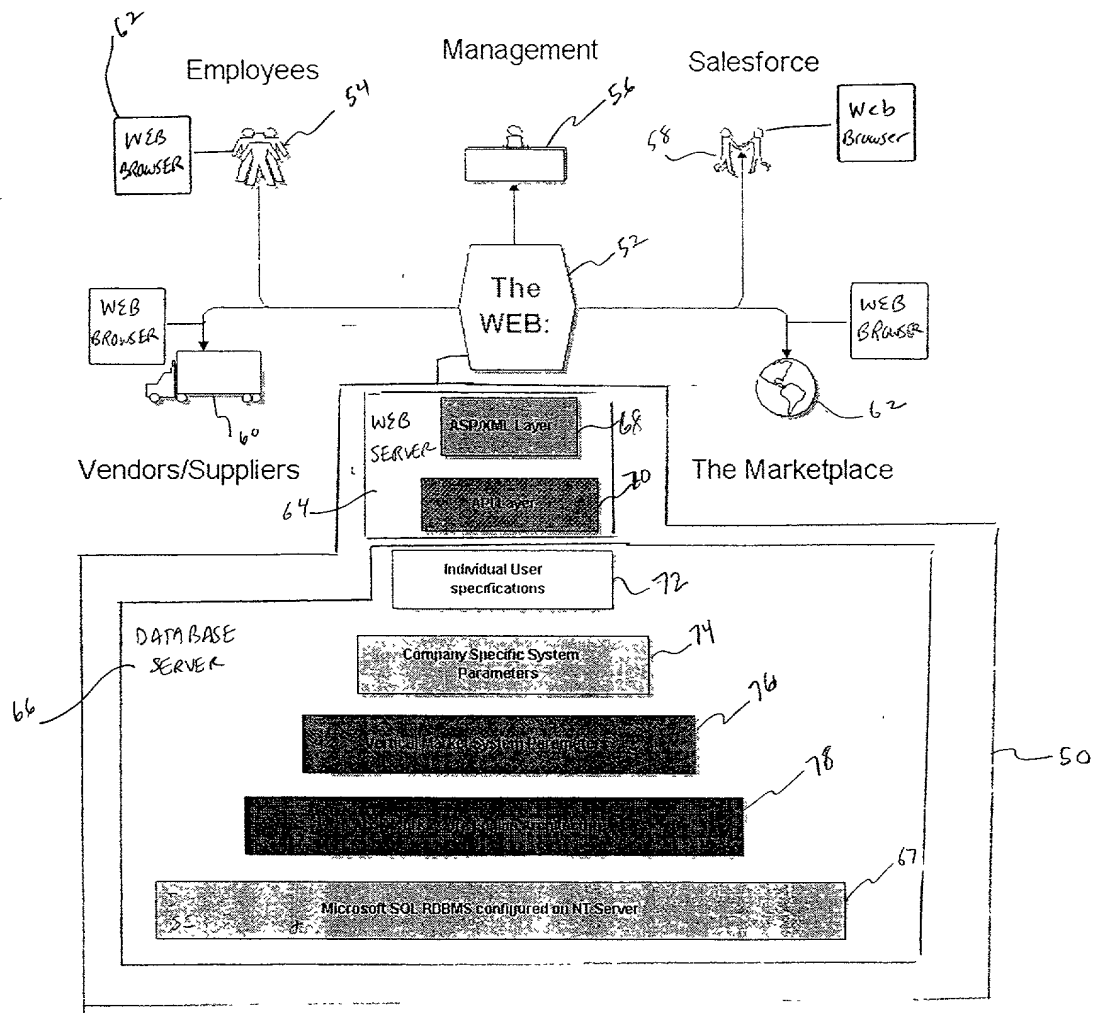


FIGURE 4.

# Overview

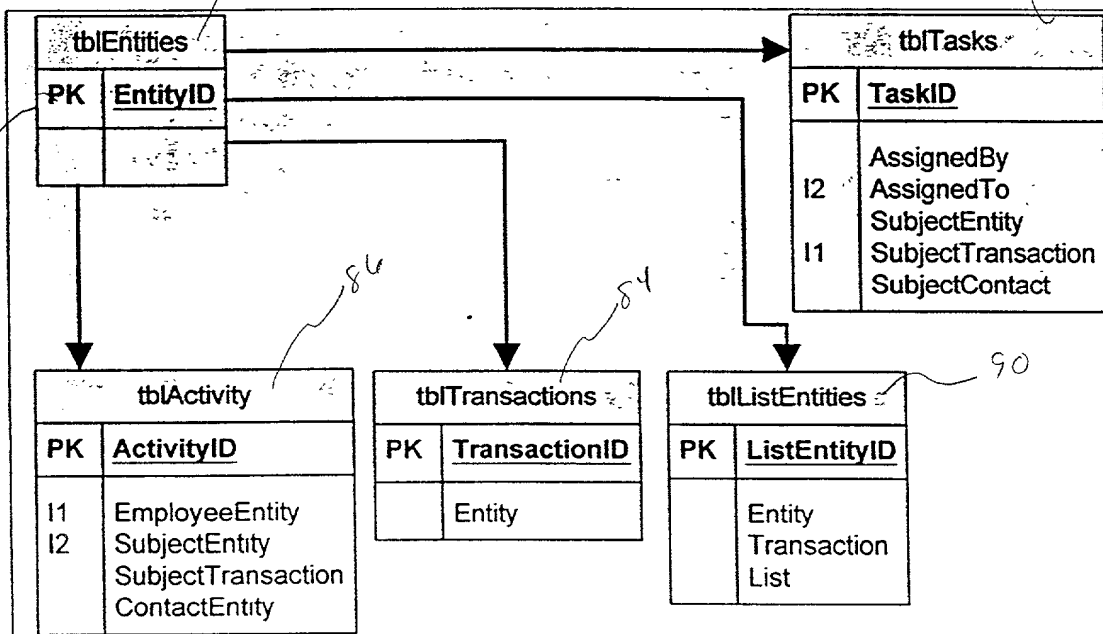


FIGURE 5

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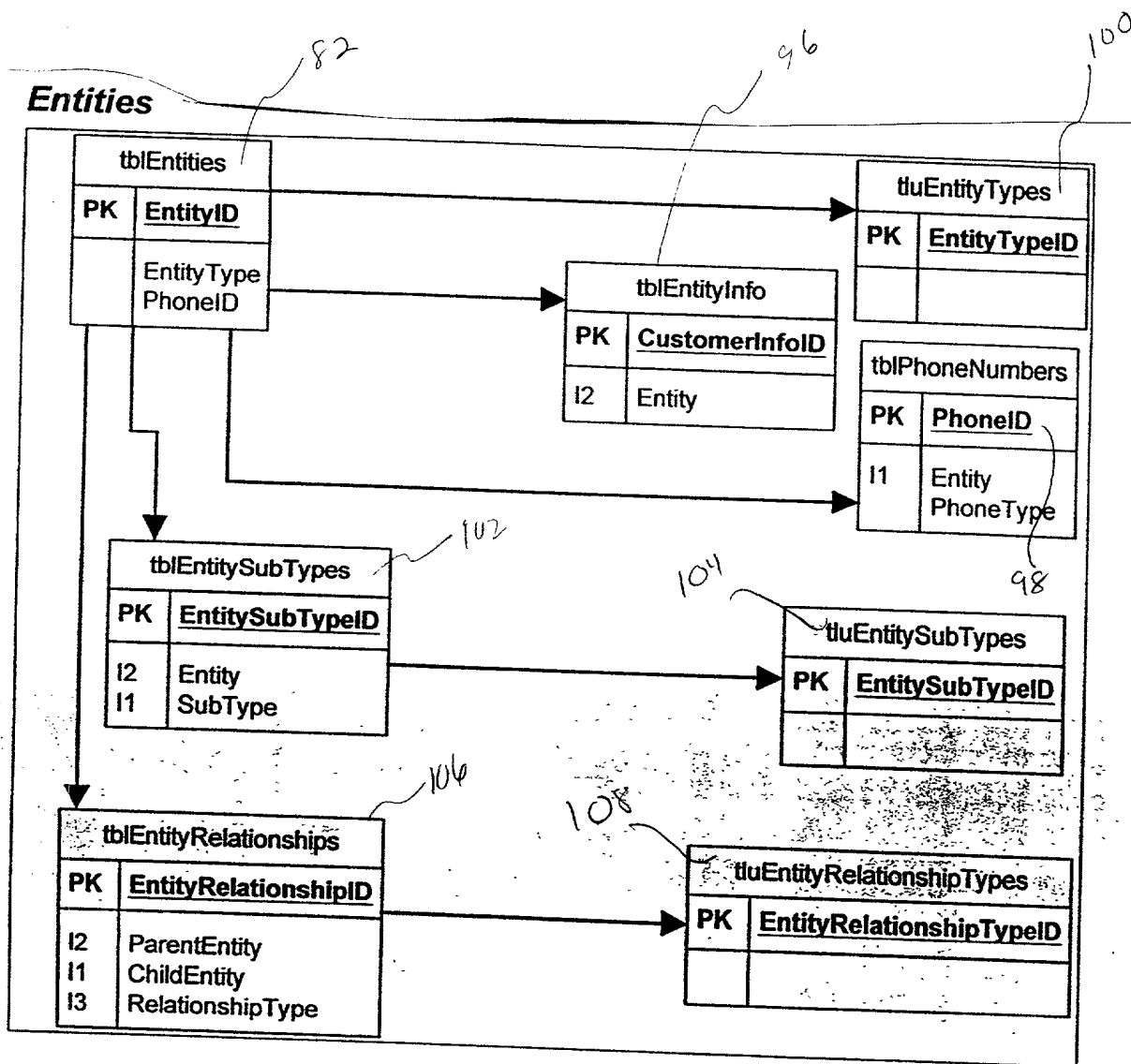


FIGURE 6

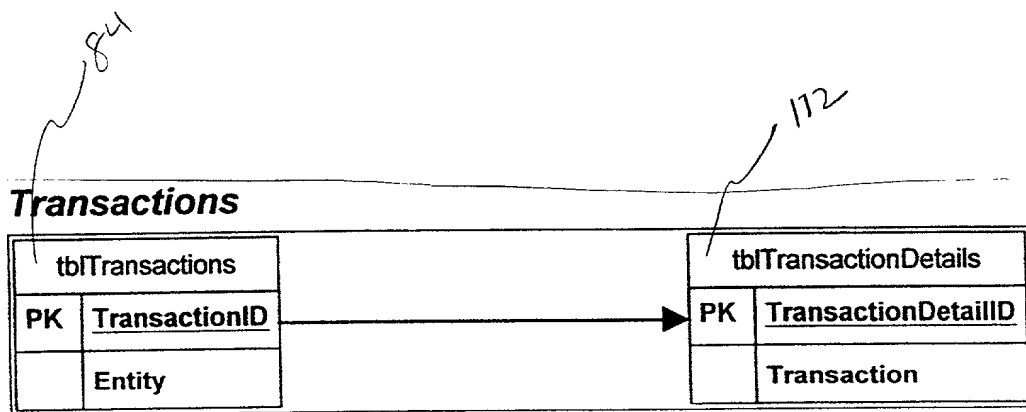


FIGURE 7

0984435 032101

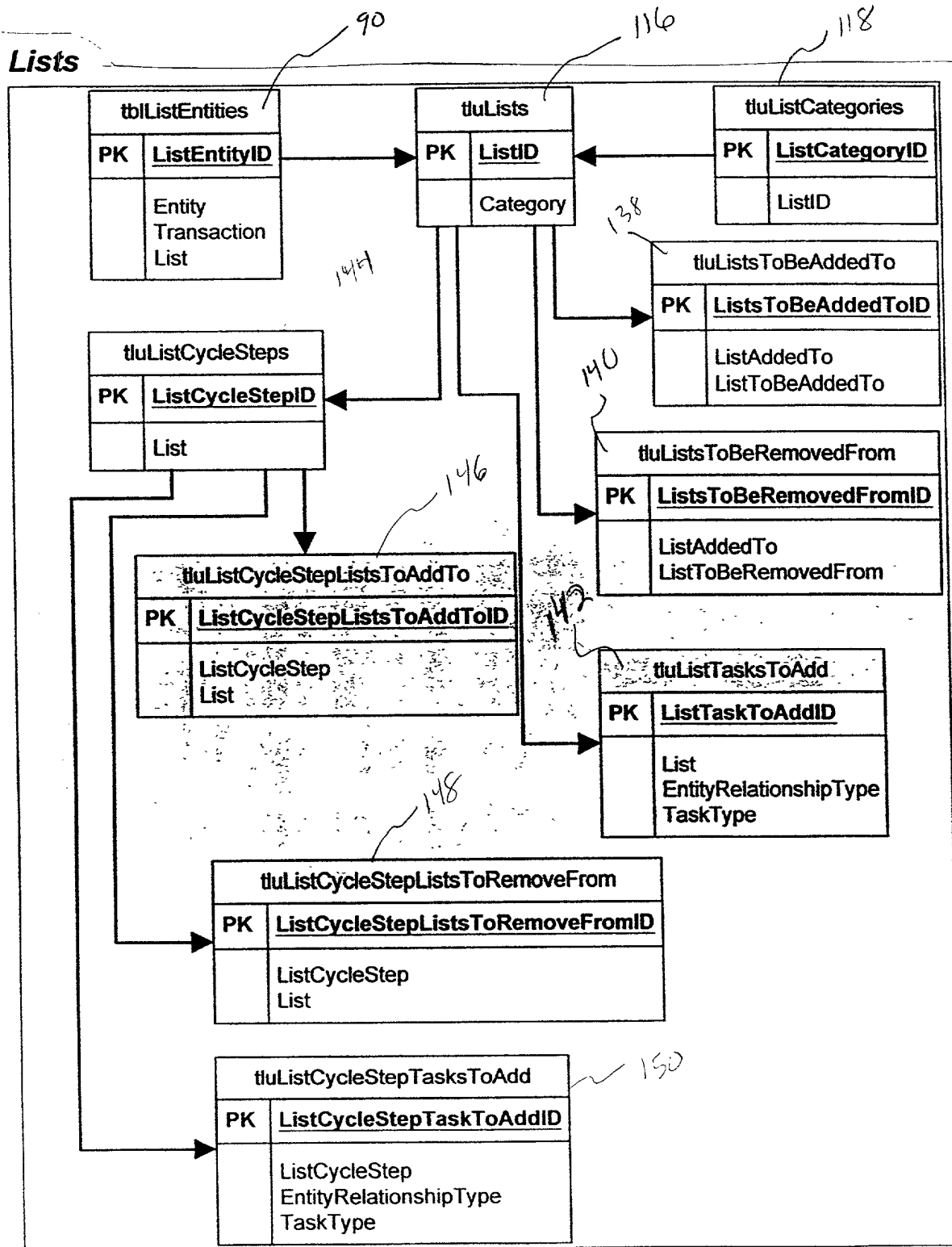


FIGURE 8



**FROM THIS**

Name	Sales Cycle Status
Alice	Suspect
Bobby	Lead
Joe	Suspect
John	Prospect
Mark	Lead
Mary	Lead
Michael	Lead
Paul	Lead
Peter	Prospect
Raymond	Hot Prospect
Rodney	Lead
Samantha	Prospect
Sylvia	Suspect
Tracy	Hot Prospect
Trent	Suspect

**TO THIS**

- Lead
  - Bobby
  - Paul
  - Michael
  - Mark
  - Mary
  - Rodney
- Suspect
  - Trent
  - Sylvia
  - Joe
  - Alice
- Prospect
  - Samantha
  - Peter
  - John
- Hot
  - Tracy
  - Raymond

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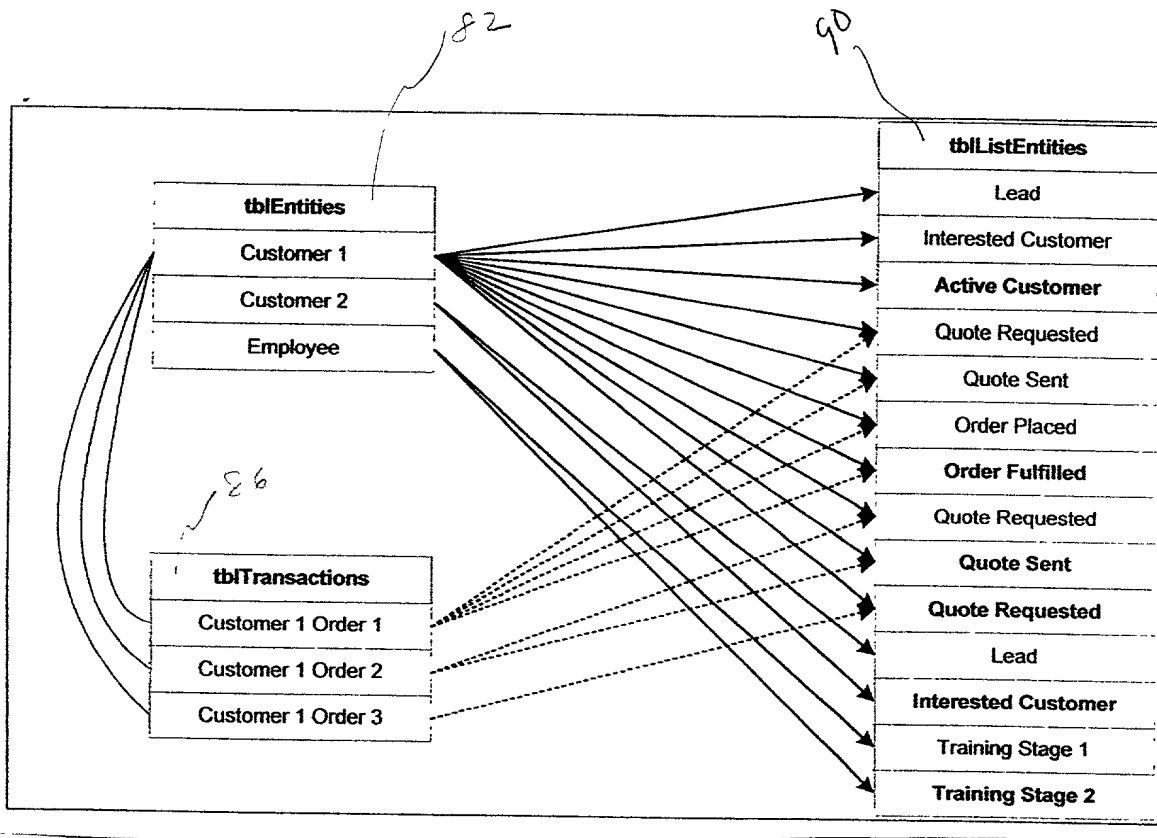


FIGURE 10

Each List can, in turn, trigger other list additions, deletions or actions immediately or after a user-definable amount of time - creating a easily specifiable and virtually limitless eProcess chain reaction.

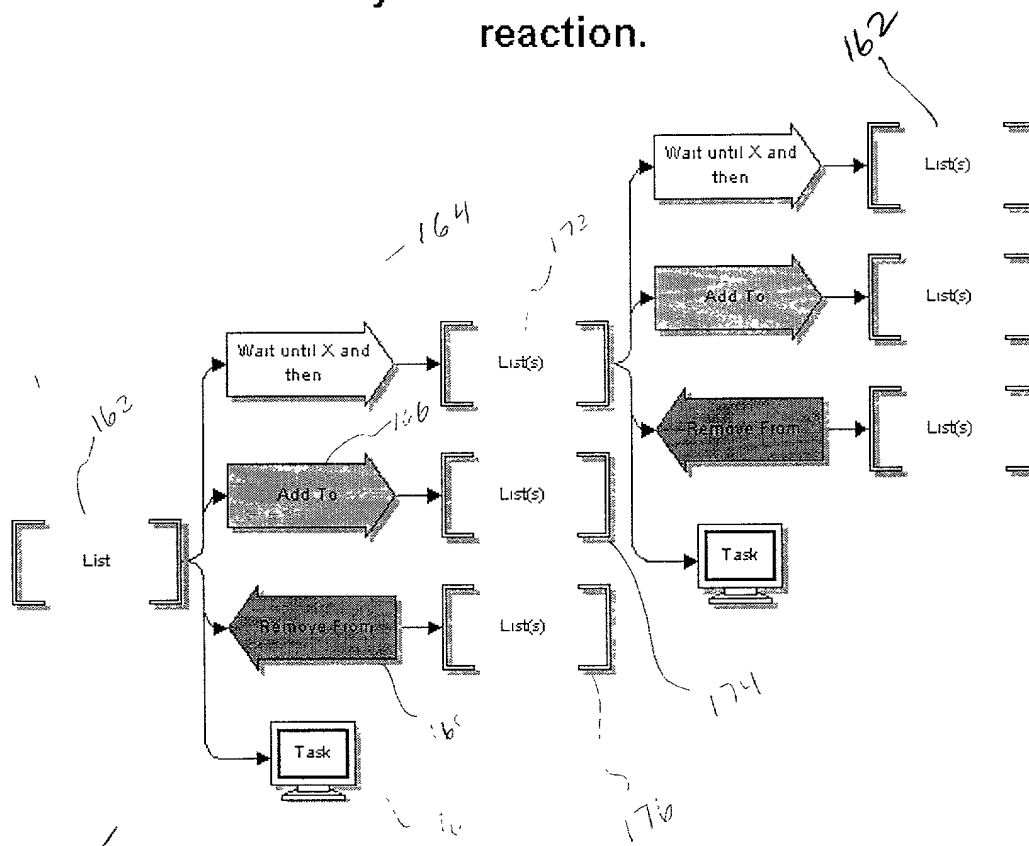


FIGURE 11

# Lists Sequences

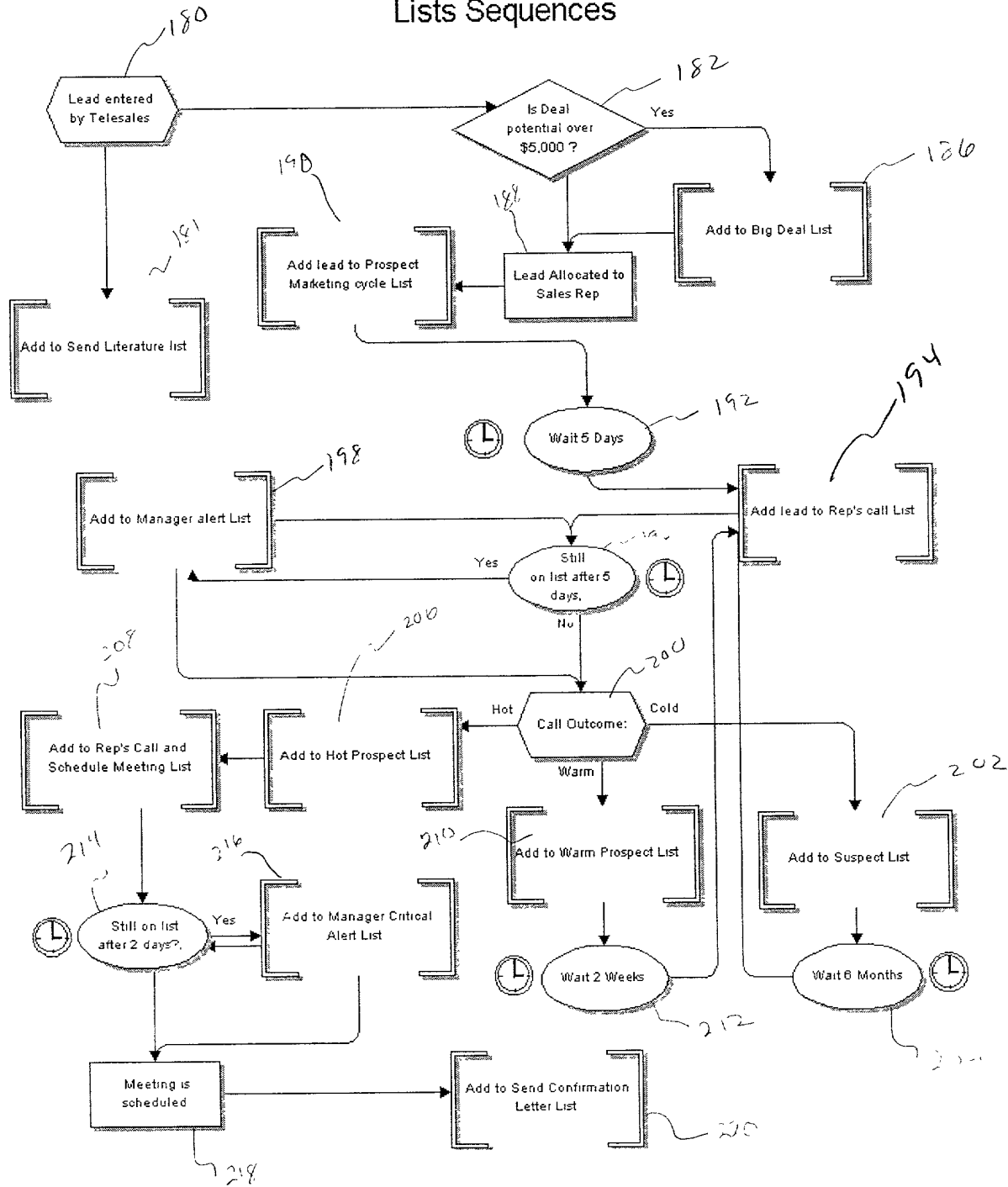


FIGURE 12

[illegible]

221

FIGURE 13



**Rules Definition**

# Behind each step is a List Rule Worksheet

Lead

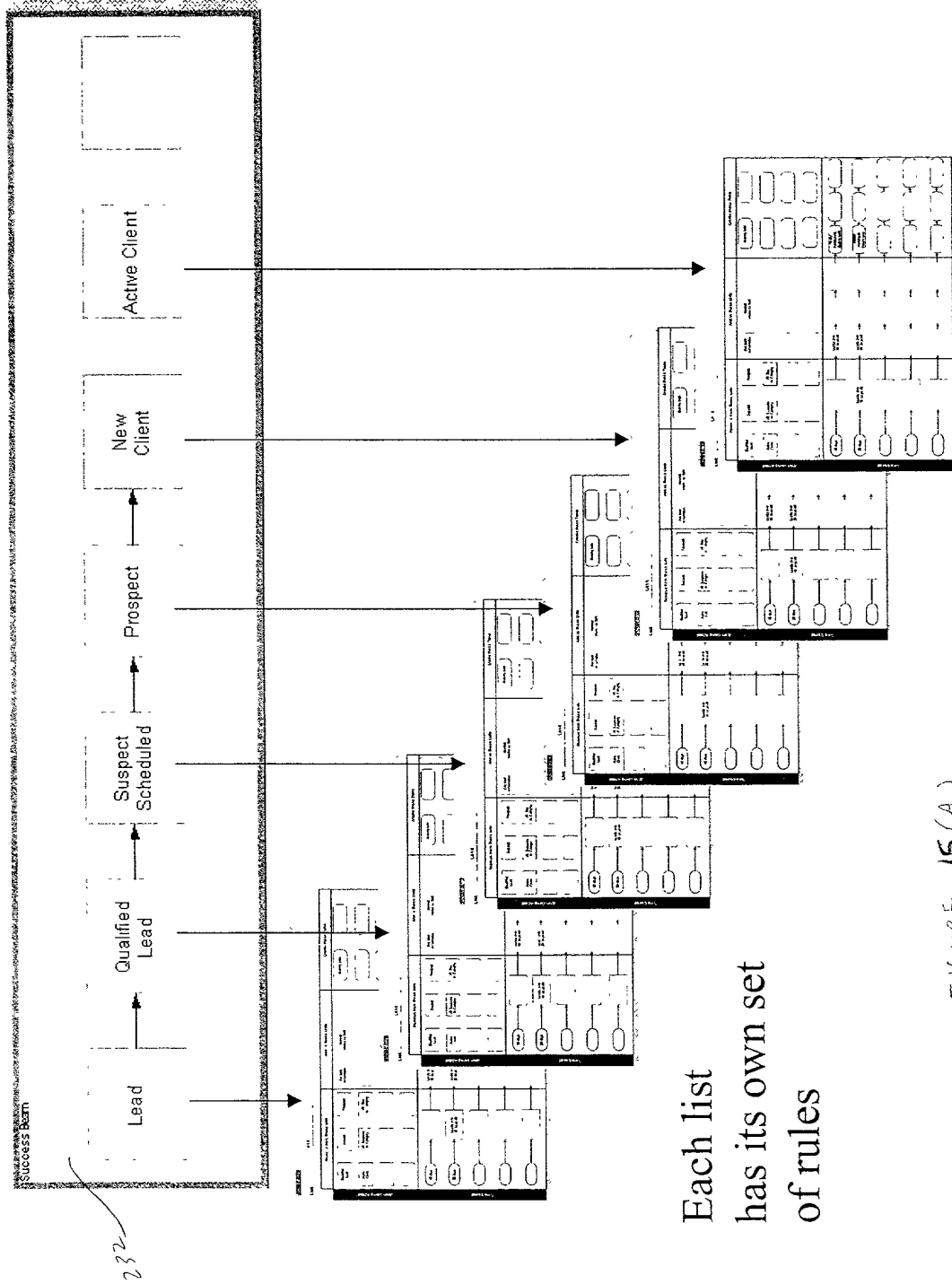
List

Remove from These Lists			Add to These Lists		Create these Tasks	
Qualified Lead	Suspect	Prospect	Get basic Information	Internal Memo to Staff	Qualify Lead	
Active Client	All Suspense in Category	All Stop in Category				
10 days			Leads over 10 days old		10 day Reminders to Qualify Lead	
20 days	Leads over 10 days old		Leads over 20 days old		Consider marking as Future Lead	

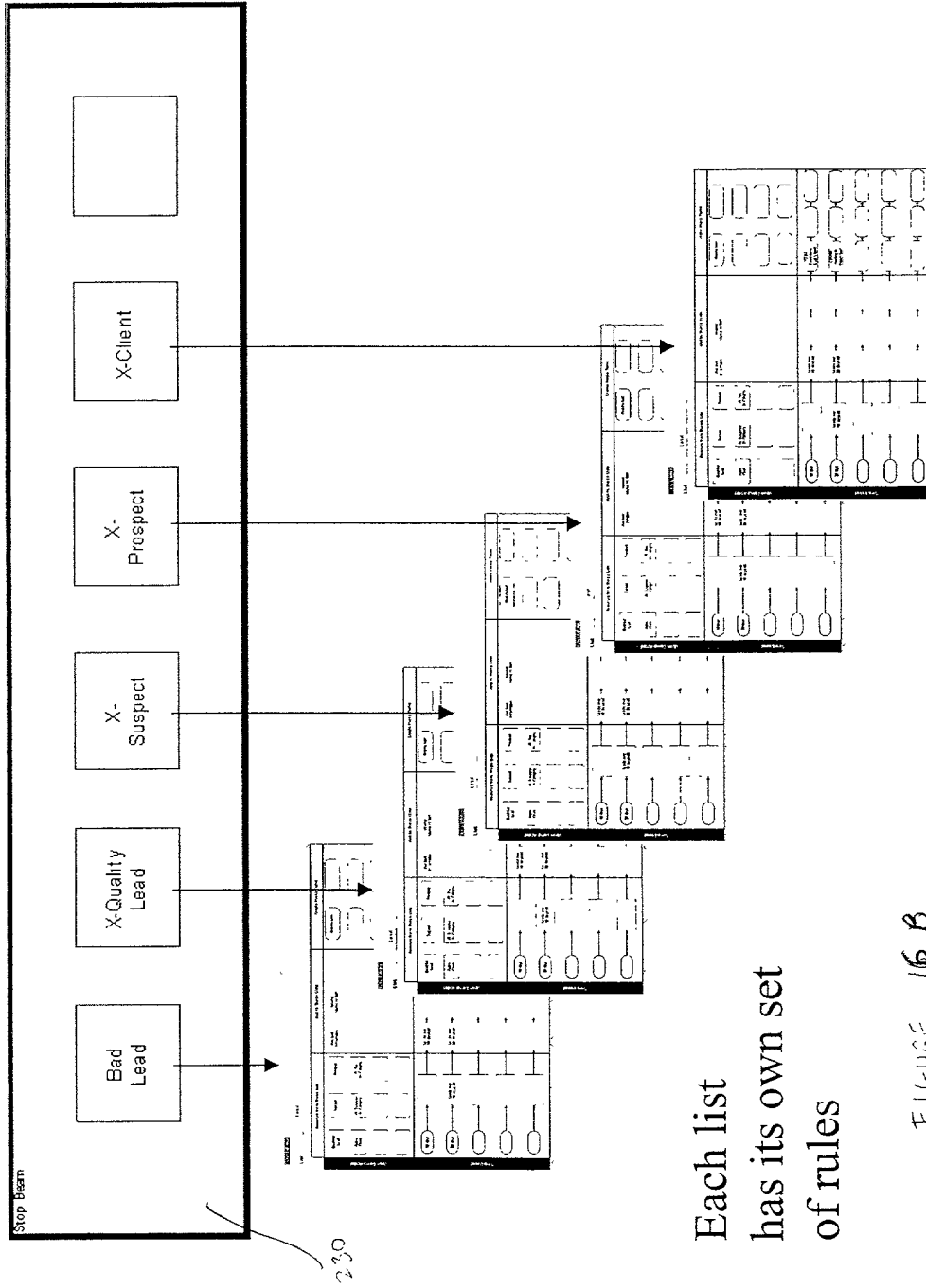
Upon Being Added

Time-Based

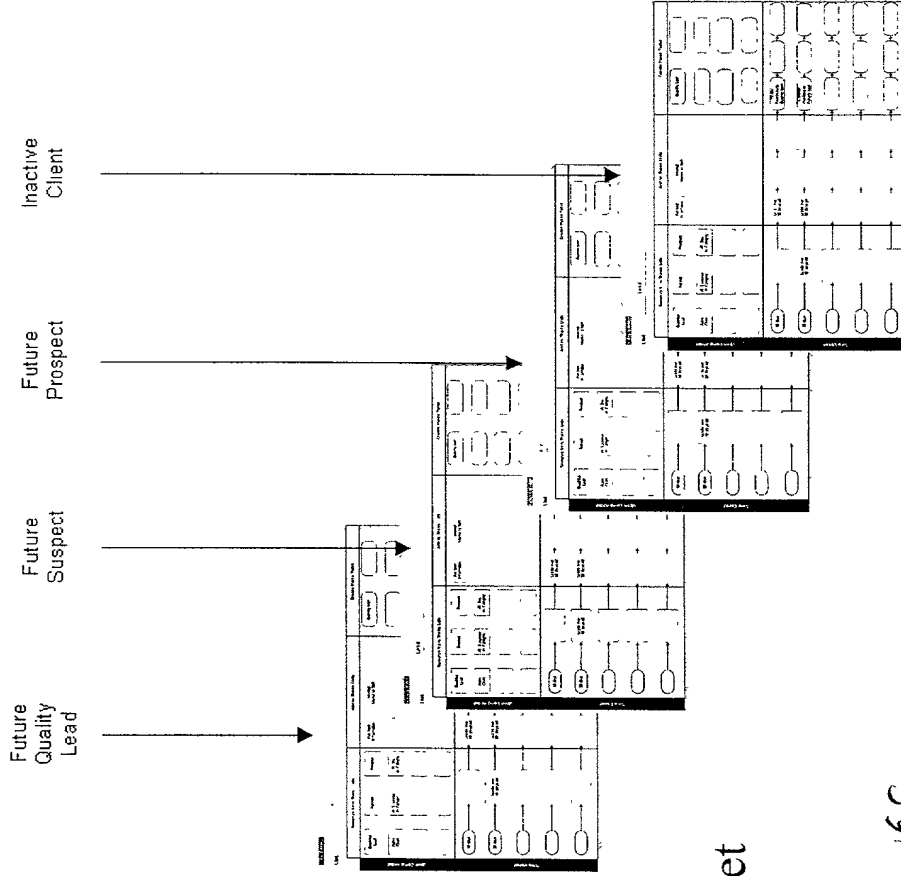
FIGURE 15







Suspense Beam



Array works

lat<sup>x</sup> e-process enablement TASKS

View As: [Erika Gordon P.]

[Delayed Unit] [Requested Unit]

Subject	Ref Date To	Due Date	Assigned By To
1. Introduction to the course	10/10/00	10/10/00	[Erika Gordon P.]
2. The course objectives	10/10/00	10/10/00	[Erika Gordon P.]
3. The course structure	10/10/00	10/10/00	[Erika Gordon P.]
4. The course materials	10/10/00	10/10/00	[Erika Gordon P.]
5. The course assessment	10/10/00	10/10/00	[Erika Gordon P.]
6. The course contact details	10/10/00	10/10/00	[Erika Gordon P.]
7. The course feedback	10/10/00	10/10/00	[Erika Gordon P.]
8. The course evaluation	10/10/00	10/10/00	[Erika Gordon P.]
9. The course completion	10/10/00	10/10/00	[Erika Gordon P.]
10. The course conclusion	10/10/00	10/10/00	[Erika Gordon P.]
11. The course summary	10/10/00	10/10/00	[Erika Gordon P.]
12. The course final	10/10/00	10/10/00	[Erika Gordon P.]
13. The course end	10/10/00	10/10/00	[Erika Gordon P.]
14. The course close	10/10/00	10/10/00	[Erika Gordon P.]
15. The course finish	10/10/00	10/10/00	[Erika Gordon P.]
16. The course over	10/10/00	10/10/00	[Erika Gordon P.]
17. The course done	10/10/00	10/10/00	[Erika Gordon P.]
18. The course complete	10/10/00	10/10/00	[Erika Gordon P.]
19. The course finished	10/10/00	10/10/00	[Erika Gordon P.]
20. The course ended	10/10/00	10/10/00	[Erika Gordon P.]
21. The course completed	10/10/00	10/10/00	[Erika Gordon P.]
22. The course finished	10/10/00	10/10/00	[Erika Gordon P.]
23. The course over	10/10/00	10/10/00	[Erika Gordon P.]
24. The course done	10/10/00	10/10/00	[Erika Gordon P.]
25. The course complete	10/10/00	10/10/00	[Erika Gordon P.]
26. The course finished	10/10/00	10/10/00	[Erika Gordon P.]
27. The course ended	10/10/00	10/10/00	[Erika Gordon P.]
28. The course completed	10/10/00	10/10/00	[Erika Gordon P.]
29. The course finished	10/10/00	10/10/00	[Erika Gordon P.]
30. The course over	10/10/00	10/10/00	[Erika Gordon P.]

(A)

Array works

lat<sup>x</sup> e-process enablement SCHEDULE

November 21, 2000 View As: [Erika Gordon P.] Months: 22 41 74

November, 2000

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

(B)

Figure 17

(c)

```

graph LR
    Root[LEAD SYSTEM  
10/20/91 1.01] --- Organization
    Root --- Individual
    Root --- Staff

    Organization --- OrgFields[Fields]
    Organization --- OrgRel[Relationships]
    Organization --- OrgLC[LCs]

    OrgLC --- Lead[Lead]
    OrgLC --- OrgStatus[Org. Status]
    OrgLC --- OrgSource[Source]

    Lead --- NewInquiry[New Inquiry]
    Lead --- HotProspect[Hot Prospect]
    Lead --- ContractPending[Contract Pending]
    Lead --- ActiveClient[Active Client]
    Lead --- FutureProspect[Future Prospect]
    Lead --- ColdProspect[Cold Prospect]
    Lead --- RollThrough[Roll Through]
    Lead --- InactiveClient[Inactive Client]

    OrgStatus --- Internet[Internet]
    OrgStatus --- Advertising[Advertising]
    OrgStatus --- GuestEvent[Guest at event]
    OrgStatus --- Other[Other]

    Individual --- IndFields[Fields]
    Individual --- IndRel[Relationships]
    Individual --- IndLC[LCs]

    IndLC --- Name[Name]
    IndLC --- IndStatus[Ind. Status]
    IndLC --- IndSource[Source]

    Name --- Address[Address]
    Name --- Email[Email]
    Name --- Phone[Phone #s]

    IndStatus --- Unassigned[Unassigned]
    IndStatus --- ProspectSendInfo[Prospect - Send Info]
    IndStatus --- ProspectHasInfo[Prospect - Has Info]
    IndStatus --- Flower[Flower]
    IndStatus --- Client[Client]

    IndSource --- Internet[Internet]
    IndSource --- Advertising[Advertising]
    IndSource --- GuestEvent[Guest at event]
    IndSource --- Other[Other]

    Staff --- StaffRel[Relationships]
    Staff --- StaffFields[Fields]
    Staff --- StaffLC[LCs]

    StaffFields --- Date[Date]
    StaffFields --- Budget[Budget]
    StaffFields --- People[# People]

    StaffLC --- OrgEventStatus[Org. Event Status]
    StaffLC --- OrgEventResources[Org. Event Resources]
    StaffLC --- OrgEventExtras[Org. Event Extras]
    StaffLC --- OrgEventType[Org. Event Type]

    OrgEventStatus --- Potential[Potential]
    OrgEventStatus --- Confirmed[Confirmed]
    OrgEventStatus --- Canceled[Canceled]
    OrgEventStatus --- Completed[Completed]

    OrgEventResources --- Racing[Racing]
    OrgEventResources --- Billiards[Billiards]
    OrgEventResources --- Catering[Catering]
    OrgEventResources --- Dining[Dining]

    OrgEventExtras --- AudioVideo[Audio/Video]
    OrgEventExtras --- Flowers[Flowers]
    OrgEventExtras --- Tophats[Tophats]
    OrgEventExtras --- Clothing[Clothing]
    OrgEventExtras --- Lingerie[Lingerie]
    OrgEventExtras --- Other[Other]

    OrgEventType --- Retreat[Retreat]
    OrgEventType --- ProductLaunch[Product Launch]
    OrgEventType --- Training[Training]
    OrgEventType --- Other[Other]
  
```

Figure 18

View As:

Long, Chris



[Requested On/By]



	Subject	Relates To	Due Date	Assigned By/To
2	[No Subject]	Cardinal Distributors	✓	2 [ ] ⇒ Quast, Karen
3	Follow-up call	Logica Mobile Networks	-	
3	Payment follow-up	Corcoran Management	-	
3	follow-up	Don Law	-	
3	Summer outing	KCL Imaging	-	
3	June 13	Nixon Peabody	-	
3	Aug meeting	Reves, Carlos	-	
3	follow up	Tweeter	-	
3	Please follow up to mailing	Firm Affairs, Inc	✓	3 [ ] ← Quast, Karen
3	Please follow up to mailing	Abington Savings Bank	✓	3 [ ] ← Quast, Karen
3	Please follow up to mailing	Reves, Carlos	✓	3 [ ] ← Quast, Karen
3	Ceridian 4-16-01	Ceridian	-	
3	follow up	Firm Affairs, Inc	-	
3	Follow-up	Abington Savings Bank	-	
3	[No Subject]	Printex	-	
3	[No Subject]	WAN Architects	-	
3	incoming fax	Corcoran Management	-	
3	[No Subject]	Tweeter	-	
3	follow up	Roberts Animal Hospital	-	
3	Please call	Auspice, Inc	-	3 [ ] ← Quast, Karen

Select All

(1 - 20 of 22) >>

Limit to 20

Go

Update

[Delegate To...]

Set Priority

To:

Defer

For:

or

until

or

undefer

FIGURE 19A



ON      OFF



Active (on by default)

Active – deferred until time has expired (on by default)

Deferred until future date/time (off by default)



Show items that have been read (on by default)

Show items that haven't been read (on by default)



Show Self-appointed items (on by default)

Show Delegated items (on by default)

Show Received items (on by default)



Show open items (on by default)

Show items Marked-for-sign-off (on by default)

Show items Signed-off (off by default)



Show items that have been read by Requested Of/By (on by default)

Show items that haven't been read by Requested Of/By (on by default)

FIGURE 19B



Create task and link it to current page



Create another item (type of item depends on which page icon appears)



Convert current page to printable format



Save current changes



Download current entity information to Microsoft Outlook



Create an activity record and associate it to current page/entry



If view is anchored, then move to previous item



If view is anchored, then move to next item

FIGURE 19C



[a]<sup>+</sup> e-process enablement TASKS

View As: Long, Chris

[Requested Of/By]

Subject	Relates To	Due Date	Assigned By/To
2 [No Subject]	Cardinal Distributors	✓	2 ⇒ Quast, Karen
3 June 13	Nixon Peabody	-	
3 Please follow up to mailing	Firm Affairs Inc	✓	3 ← Quast, Karen
3 Please follow up to mailing	Abington Savings Bank	✓	3 ← Quast, Karen
3 Please follow up to mailing	Reyes, Carlos	✓	3 ← Quast, Karen
3 [No Subject]	Printex	-	
3 [No Subject]	WAN Architects	-	
3 Please call	Auspice Inc	-	3 ← Quast, Karen
3 Please call	Protor & Gamble	-	3 ← Quast, Karen
3 Please follow up to mailing	Rai-Mar Salon & Spa	-	3 ← Quast, Karen

Select All (1 - 10 of 10) Limit to 20 Go

Update [Delegate To.] Set Priority To: Defer For: or until or undefer

FIGURE 20

Assigned To: Piasecki, Richard By Quast, Karen

Priority: 3 (Assigned To Priority - 3)

Description: 25 - 100 people Date undetermined

Due Date:

[Goto Page]

#### Interested Parties

#### Comments and Actions

Date	By	Comment
03/01/01 04:34 PM	Piasecki, Richard	The task was marked for sign-off on 3/1/2001 4:34:25 PM
03/01/01 04:34 PM	Piasecki, Richard	End of the month over, sales meeting on monday will call
02/26/01 07:40 PM	Quast, Karen	The task was reactivated on 2/26/2001 7:40:11 PM
02/26/01 04:14 PM	Piasecki, Richard	The task was marked for sign-off on 2/26/2001 4:14:13 PM
02/26/01 04:14 PM	Piasecki, Richard	Site visit (?) with Pete Cronin Thurs PM
02/14/01 01:24 PM	Quast, Karen	Please give me status on this RJ wants to follow this mailing
02/14/01 01:24 PM	Quast, Karen	The task was reactivated on 2/14/2001 1:24:04 PM
02/14/01 01:00 PM	Piasecki, Richard	The task was marked for sign-off on 2/14/2001 1:00:25 PM
02/14/01 01:00 PM	Piasecki, Richard	Invited him in for a SV this week, Fri no confirmation yet
02/14/01 11:39 AM	Quast, Karen	is site visit scheduled?
02/14/01 11:39 AM	Quast, Karen	The task was reactivated on 2/14/2001 11:39:12 AM
02/14/01 09:33 AM	Piasecki, Richard	may come in for a site visit 2-16
02/09/01 10:42 AM	Piasecki, Richard	The task was marked for sign-off on 2/9/2001 10:42:04 AM
02/09/01 10:42 AM	Piasecki, Richard	Great Lead from mailer, will come in for site visit, incentive event in MAR
02/08/01 10:29 PM	Quast, Karen	The task was delegated

Comment:

Add Comment

#### Subdelegated Tasks

P	SQS	URR	URT	Subject	Relates To	Assigned To	Due Date
---	-----	-----	-----	---------	------------	-------------	----------

FIGURE 21

(a)<sup>x</sup>

e-process enablement **TASK**



**Subject:** Sample Task

**Relates To:** Earle, Gordon

**Delegate To:** [Delegate To...]

**Priority:** 3

**Description:** [Text area with up and down arrows]

**Due Date:** [Text field]

**Defer:** For [Defer For...] or until [Text field]

**Private:** ☐

[Sign Off]

**Interested Parties**

**Comments and Actions**

Date	By	Comment
------	----	---------

**Comment:** [Text area with up and down arrows]

Add Comment

**Subdelegated Tasks**

P	SOS	URB	URT	Subject	Relates To	Assigned To	Due Date
---	-----	-----	-----	---------	------------	-------------	----------

FIGURE 28